

DOCUMENT RESUME

ED 288 016

CE 048 871

AUTHOR Garozzo, Joyce
TITLE A Curriculum Guide for Medical Record Technologist.
Final Report.
INSTITUTION Harrisburg Area Community Coll., Pa.
SPONS AGENCY Pennsylvania State Dept. of Education, Harrisburg.
Bureau of Vocational and Adult Education.
PUB DATE 1 Oct 87
CONTRACT 85-7015
NOTE 79p.
PUB TYPE Guides - Classroom Use - Guides (For Teachers) (052)
EDRS PRICE MF01/PC04 Plus Postage.
DESCRIPTORS Allied Health Occupations Education; Behavioral Objectives; Clerical Workers; *Course Content; Curriculum Development; Educational Needs; File Clerks; Medical Case Histories; *Medical Record Administrators; *Medical Record Technicians; Postsecondary Education; Recordkeeping; State Curriculum Guides
IDENTIFIERS *Pennsylvania

ABSTRACT

This curriculum guide was developed as a result of a project conducted in Pennsylvania to review, update, and revise the vocational-technical manual on file in the Pennsylvania Department of Education and to develop sample curriculum for the preparation of a medical record technologist program using the skills developed in the manual. The guide is organized in three sections. The first section describes the project, while the second section outlines the proposed curriculum and provides descriptions for core courses and medical records technologist courses. The third section, the revised vocational-technical manual, contains job and task listings for seven job categories: (1) processing and abstracting health record information; (2) maintenance of health record information; (3) performing clerical functions; (4) maintaining quality control; (5) management and supervision of employees; (6) preparation of administrative and clinical reports; and (7) preparation of general administrative services. For each task listed for each job category, a performance objective is given and duties and responsibilities are listed. (KC)

* Reproductions supplied by EDRS are the best that can be made *
* from the original document. *

ED288016

FINAL REPORT

A CURRICULUM GUIDE FOR MEDICAL RECORD TECHNOLOGIST

CONTRACT NUMBER: 85-7015

JOYCE GAROZZO, RRA

HARRISBURG AREA COMMUNITY COLLEGE

HARRISBURG, PENNSYLVANIA

OCTOBER 1, 1987

PENNSYLVANIA DEPARTMENT OF EDUCATION
BUREAU OF VOCATIONAL AND ADULT EDUCATION

U.S. DEPARTMENT OF EDUCATION
Office of Educational Research and Improvement
EDUCATIONAL RESOURCES INFORMATION
CENTER (ERIC)

- ☒ This document has been reproduced as received from the person or organization originating it.
- ☐ Minor changes have been made to improve reproduction quality.

• Points of view or opinions stated in this document do not necessarily represent official OERI position or policy

"PERMISSION TO REPRODUCE THIS
MATERIAL HAS BEEN GRANTED BY

B Ford

TO THE EDUCATIONAL RESOURCES
INFORMATION CENTER (ERIC)."

CE 488 71

TABLE OF CONTENTS

	Page Number
Acknowledgements _____	i
Section 1 _____	1
Rationale _____	2
Section 2 _____	3
Proposed Curriculum _____	4
Core Course Descriptions _____	5
Medical Records Technologist Course Descriptions _____	6 - 9
Section 3 _____	10
Job Category A - Processing and Abstracting Health Record Information _____	11 - 22
Job-Category B - Maintenance of Health Record Information _____	23 - 31
Job Category C - Performing Clerical Functions _____	32 - 40
Job Category D - Maintaining Quality Control _____	41 - 48
Job Category E - Management and Supervision of Employees _____	49 - 58
Job Category F - Preparation of Administrative and Clinical Reports _____	59 - 64
Job Category G - Preparation of General Administrative Services _____	65 - 74

ACKNOWLEDGEMENTS

This author wishes to express her thanks to the following individuals and organizations for their help in the preparation of this document.

1) Mr. Barry Barnhart, Mr. Eugene Hollick and the staff of the Regional Computer Resource Center at the Harrisburg Area Community College, Harrisburg, Pennsylvania for their continued assistance in micro-word processing on the Macintosh Plus computer system.

2) Mr. John J. Ford , Technical Director for this grant, and Ms. Bernadette Giordano of the Science, Nursing, Allied Health, Physical Education Division of the Harrisburg Area Community College for their assistance in the development of this document.

3) Mr. Randall L. Patton, RRA, Director of the Medical Records Department , Holy Spirit Hospital of Harrisburg, Pennsylvania for his technical consultation in determining the clinical application of the skills presented. His working knowledge of the coding systems and operations of a department made him a valuable resource.

4. Dr. Michael A. Wojdylak for his all his input and computer skills that were needed to prepare the actual document.

SECTION 1

INTRODUCTION AND PURPOSE OF THE GRANT PROPOSAL

RATIONALE

The purpose of this project was to review, update and revise the existing V-Tech manual on file in the Department of Education and to develop a sample curriculum for the preparation of a Medical Record Technologist Program utilizing the skills developed in the manual.

OBJECTIVES:

- 1) Prepare curriculum for a two year program in Medical Records Technology.
- 2) Review and update skills necessary for a Medical Records Technologist.
- 3) Add new skills which include new coding methods and computer applications for a Medical Records Technologist.
- 4) Review all skills to reflect current practice as a Medical Records Technologist.

This project will provide a useful guide for in-service, vocational education and community college curriculum development. The guide will assist educators and hospital education personnel develop educational programs for students/employees assigned to their department.

SECTION 2

PROPOSED MEDICAL RECORDS TECHNOLOGIST PROGRAM

MEDICAL RECORD TECHNOLOGY CURRICULUM

FALL (YEAR 1)

Medical Terminology	4.0
Anatomy and Physiology 1	4.0
Medical Record Science 1	4.0
Composition 1	3.0
Community Health	2.0
	17.0

SPRING (YEAR 1)

Anatomy and Physiology 2	4.0
Medical Record Science II	4.0
Medical Transcription	2.0
Composition 2	3.0
Directed Practice 1	2.0
	17.0

FALL (YEAR 2)

Medical Record Science 3	3.0
Pathophysiology	3.0
Health Record Classification and Nomenclature Systems	3.0
Directed Practice 2	2.0
Speech 1	3.0
Data Processing	3.0
	17.0

SPRING (YEAR 2)

Medical Record Science 3	2.0
Supervision and Management in Health Record Systems	3.0
Directed Practice 3	4.0
General Psychology	3.0
Humanities Elective	3.0
	15.0

Total credits to graduate = 66.0

CORE COURSE DESCRIPTIONS

COMPOSITION 1

The development of fluency in writing clear, forceful, effective prose.
Prerequisite: Placement through Competency Examination or completion of an English Essentials course with a grade of C or higher.

COMPOSITION 2

Continuation of Composition 1. Emphasis on writing argumentative essays. Prerequisite: Composition 1 with a grade of C or higher.

SPEECH 1

An introduction to oral communication with emphasis on helping the student increase competence as a communicator in interpersonal, small group, and public speaking contexts.

DATA PROCESSING

Topics covered are use of CRT's; a study of the most common computer systems including use of computers in business systems; project planning; more common configurations, associated number systems, coding systems, secondary storage and communication devices; basic introduction to the Assembler language.

GENERAL PSYCHOLOGY

Examination and observation of principles of motivation, emotion, learning, perception, intelligence, and personality; origins, nature and purpose of psychology.

ELECTIVE #1

A humanities elective course is recommended.

(Educational Note: Student should have adequate typing skills and test into college mathematics.)

MEDICAL RECORD TECHNOLOGY COURSE DESCRIPTIONS

ANATOMY AND PHYSIOLOGY 1

Intended for students who contemplate careers in Allied Health fields; basic body organization; functional biochemistry; cytology, histology; study of integumentary, skeletal, muscular, circulatory, and respiratory systems; emphasis on the study of normal anatomy and physiology with clinical applications. Prerequisite: High school biology and chemistry or college equivalent.

ANATOMY AND PHYSIOLOGY 2

A continuation of Anatomy and Physiology 1. A comprehensive study of the digestive, excretory, endocrine, reproductive, and nervous systems. Prerequisite: Anatomy and Physiology 1 with a grade of C or higher.

MEDICAL TERMINOLOGY

A study of the language of medicine and health care; includes word analysis, definition and word building of anatomical, medical, surgical and diagnostic terms. Includes practice in pronunciation.

COMMUNITY HEALTH

Various types of health care institutions, agencies, services, and practitioners will be discussed. A total concept of health care and the socioeconomic and environmental aspects will be explored so that the student can develop an awareness of the systems that society utilizes for health care needs.

MEDICAL RECORD SCIENCE 1

An introduction to the field of medicine and the medical record profession. Analysis of the health record, to include format, content, development and control will be presented. There also will be an orientation to professional organizations, ethics, accrediting and licensing agencies and the medical staff. Prerequisite or corequisite: Medical Terminology.

MEDICAL RECORD SCIENCE 2

An introduction to the legal aspects of health care documentation. Special record formats, such as nursing home and home health care will be discussed. Classification systems, nomenclatures, special registries and indexing will be included. Prerequisite: Medical Record Science 1.

MEDICAL TRANSCRIPTION

Skills and knowledge essential to operating transcribing and dictating equipment for various types of medical and surgical reports and correspondence will be practiced. The concept of word processing, types of equipment, personnel and environment will be included. Prerequisite: Medical Terminology, adequate typing speed, English Composition 1.

HEALTH DATA STATISTICS

Presents an introduction to health data statistics used in health care facilities. Basic statistical concepts including measures of central tendency, graph presentation, and methods for retrieval data for reporting purposes will be included. Prerequisite: College Mathematics, Medical Record Science 1.

PATHOPHYSIOLOGY

Disease processes, including general classification of causes of disease, signs, symptoms, diagnostic measures, types of treatment, and terminology will be presented. Prerequisite: Anatomy and Physiology 1 and 2, Medical Terminology.

DIRECTED PRACTICE 1

Supervised basic practice session in an affiliated health care facility medical record department for application of theory to practice of medical record science. Prerequisite: Medical Record Science 1, Corequisite: Medical Record Science 2.

DIRECTED PRACTICE 2

A continuation of Directed Practice 1 with concentration on medicolegal aspects, coding, abstracting, statistics, and quality assurance activities. Prerequisite: Directed Practice 1.

HEALTH RECORD CLASSIFICATION AND NOMENCLATURE SYSTEMS

Principles and practice of coding health records, with emphasis on the International Classification of Diseases - Ninth Revision - Clinical Modification (ICD-9-CM) and Current Procedural Terminology (CPT-4). Prerequisite: Anatomy and Physiology 1 and 2, Medical Terminology, and Medical Record Science 2.

MEDICAL RECORD SCIENCE 3

This course presents medical care evaluation techniques including quality assurance, utilization review, diagnostic related groups (DRG), and the Professional Review Organization (PRO). The tumor registry is also discussed. Prerequisite: Medical Record Science 2, and Health Data Statistics.

MANAGEMENT AND SUPERVISION OF HEALTH RECORD SYSTEMS

Principles and theories of management and supervision with emphasis on the supervisor's role in planning, organizing, staffing, controlling and directing a medical record department. Also includes practice in writing job descriptions, procedures and policies. Prerequisite: Medical Record Science 3.

DIRECTED PRACTICE 3

Advanced supervised practice in affiliated health record departments, including nursing homes, outpatient facilities, insurance companies and hospitals. Concentration on coding, supervision, and computer aspects. Prerequisite: Directed Practice 2.

DIRECTED PRACTICE 4

Discussion related to directed practice and problem solving are presented. Resume writing and interviewing techniques are practiced. Prerequisite: Student must be in last semester of program.

SECTION 3

REVISED V-TECH MANUAL

JOB CATEGORY - A

PROCESSING AND ABSTRACTING HEALTH RECORD INFORMATION

TASK #1 - ACTIVATE A PATIENT'S HEALTH RECORD

PERFORMANCE OBJECTIVE

Given patient registration information, activate a patient's health record. To be rated as acceptable, a health record must be activated for all patients according to departmental policies and procedures without error.

DUTIES AND RESPONSIBILITIES

1. Patient registration information is received.
2. Check patient master index for previous information.
3. Assign hospital number to patient or verify number if issued by another department.
4. Update or add information into patient index or computer.
5. If previous admission, activate previous records and sign out to appropriate individual or unit.
6. Check number of patients indexed with patients registered.
7. Complete admission register.

JOB CATEGORY - A

PROCESSING AND ABSTRACTING HEALTH RECORD INFORMATION

TASK #2 - PREPARE A PATIENT'S HEALTH RECORD FOLDER

PERFORMANCE OBJECTIVE

Given a patient's health record, prepare or update the record folder. To be rated as acceptable, the information recorded on the folder must be neat, legible, accurate and recorded according to departmental policies and procedures without error.

DUTIES AND RESPONSIBILITIES

1. Receive a health record to be placed in a folder.
2. Print necessary information in appropriate place on folder.
3. Check health record documents against information printed on folder (patient name, medical record number) to ensure correct filing.
4. Secure health record to folder.
5. Place health record folder in appropriate area.

JOB CATEGORY - A

PROCESSING AND ABSTRACTING HEALTH RECORD INFORMATION

TASK #3 - PREPARE A BIRTH CERTIFICATE AND COMPLETE BIRTH REGISTRY

PERFORMANCE OBJECTIVE

Given birth information, prepare birth certificate and complete birth registry. To be rated as acceptable, the birth certificate must be completed according to departmental policies and procedures and State Bureau of Vital Statistics guidelines without error. The birth registry must be neat, legible and completed without error.

DUTIES AND RESPONSIBILITIES

1. Receive information regarding a birth.
2. Give informant (mother, father, or designee) birth information worksheet to complete.
3. Obtain worksheet from informant and verify all information.
4. Type information from worksheet onto original birth certificate according to guidelines from the State Bureau of Vital Statistics.
5. Obtain necessary medical information from health record and/or attending physician.
6. Check information on birth certificate for accuracy, legibility and completeness.
7. If errors are found, retype birth certificate.
8. Obtain all necessary signatures on the birth certificate.
9. Make a copy of original birth certificate to be placed on newborn's record indicating the copy is not to be released for any purpose.
10. Forward original birth certificate to the State or local registrar.
11. Print necessary information into the birth register.

JOB CATEGORY - A

PROCESING AND ABSTRACTING HEALTH RECORD INFORMATION

TASK #4 - PREPARE FETAL DEATH CERTIFICATE AND COMPLETE FETAL DEATH REGISTRY

PERFORMANCE OBJECTIVE

Upon being notified of a fetal death, prepare a fetal death certificate and complete the fetal death registry. To be rated as acceptable, the fetal death certificate must be completed according to departmental policies and procedures and the State Bureau of Vital Statistics guidelines without error. The fetal death registry must be neat, legible and completed without error.

DUTIES AND RESPONSIBILITIES

1. Receive information of a fetal death.
2. Obtain mother's health record.
3. Type information on fetal death certificate according to guidelines from the State Bureau of Vital Statistics.
4. Check information of fetal death certificate for accuracy, legibility and completeness.
5. If errors are found, retype fetal death certificate.
6. Obtain all necessary signatures on fetal death certificate.
7. Make a copy of certificate and place on mother's chart indicating the copy is not to be released for any purpose.
8. Forward original certificate to the proper official.
9. Print necessary information into fetal death registry.

JOB CATEGORY - A

PROCESSING AND ABSTRACTING HEALTH RECORD INFORMATION

TASK #5 - ASSEMBLE AND PERFORM QUANTITATIVE ANALYSIS ON PATIENT'S HEALTH RECORD

PERFORMANCE OBJECTIVE

Given a health record of a discharged or deceased patient, assemble and analyze the record quantitatively. To be rated as acceptable, the record must be assembled and analyzed according to hospital departmental policies and procedures without error.

DUTIES AND RESPONSIBILITIES

1. Collect or receive health record of discharged or deceased patient.
2. Check patient's name and medical record number with discharged listing for each discharge date.
3. Write date of discharge or death in appropriate place on face sheet.
4. Arrange each report in patient's record in the correct order (eg. all laboratory reports placed in appropriate record sequence and in chronological order.)
5. Review record for correct patient identification.
6. Review record for presence of all necessary reports.
7. Verify that all discharged or deceased patient records have been received.
8. Forward record to appropriate area according to record completion routing procedures.

JOB CATEGORY - A

PROCESSING AND ABSTRACTING HEALTH RECORD INFORMATION

TASK #6 - PERFORM QUALITATIVE ANALYSIS ON PATIENT'S HEALTH RECORD

PERFORMANCE OBJECTIVE

Given a health record in the correct sequence and analyzed quantitatively, perform qualitative analysis. To be rated as acceptable, the health record must be analyzed qualitatively without error according to departmental policies and procedures and the standards and regulations established by licensing and accrediting agencies.

DUTIES AND RESPONSIBILITIES

1. Receive record for qualitative analysis.
2. Review record for appropriate signatures and authentication for all entries.
3. Review record for necessary dictations (i.e., discharge summary, history and physical examination, operative report, etc.)
4. Review record for completeness of information.
5. review record for accuracy of information.
6. Review record for accuracy of information.
7. Record all omissions on appropriate reporting or by using computer application.
8. Reanalyze records after appropriate individuals (doctors, nurses, etc.) have had the opportunity to correct identified omissions.
9. Reroute incomplete records to responsible practitioners, as is necessary.
10. Upon reporting format or computer routines accordingly until all omissions (deficiencies) have been corrected.
11. Forward record to appropriate area according to record completion routing procedures.

JOB CATEGORY - A

PROCESSING AND ABSTRACTING HEALTH RECORD INFORMATION

TASK #7 - PREPARE AND MAINTAIN A HEALTH RECORD LOCATOR SYSTEM

PERFORMANCE OBJECTIVE

Given an in-house request for a health record, prepare and maintain a health record locator system. To be rated as acceptable, all health records must be maintained according to departmental policies and procedures without error.

DUTIES AND RESPONSIBILITIES

1. Receive request for a health record.
2. Complete requisition information.
3. Search for record through health record locator system.
4. Retrieve and sign out record from appropriate area.
5. If on computer or microfilm, generate/print necessary information or make a copy of the original microfilm medium.
6. Update health record locator system with requisition information.
7. Forward record to appropriate location.
8. When record is returned, update health record locator information.
9. Return record to appropriate area and remove sign out record from health record files or update computerized record locator applications.

JOB CATEGORY - A

PROCESSING AND ABSTRACTING HEALTH RECORD INFORMATION

TASK #8 - ABSTRACT INFORMATION FROM A HEALTH RECORD

PERFORMANCE OBJECTIVE

Given a health record, abstract information from that record. To be rated as acceptable, the abstract must be completed according to departmental policies and procedures without error.

DUTIES AND RESPONSIBILITIES

1. Receive record to be abstracted.
2. Ensure all records for each discharge are available for abstracting purposes.
3. Complete abstract according to Uniform Hospital Discharge Data Set (UHDDS) guidelines and abstract other data elements as determined by the medical staff, hospital administration, and other hospital departments.
4. Verify information on abstract with health record.
5. Make any necessary corrections.
6. Make a notation on health record that abstract has been completed.
7. Verify at the end of each discharge month that all records have been abstracted.
8. Forward health record to appropriate area.
9. Forward abstracted information to appropriate area.

(Educational Note: Abstracted health record data can be entered by on-line computer applications, in-house data processing, personnel (batch entry), or by a contracted data processing service.)

JOB CATEGORY - A

PROCESSING AND ABSTRACTING HEALTH RECORD INFORMATION

TASK # 9 - COMPLETION OF INSURANCE FORM

PERFORMANCE OBJECTIVE

Given specifications of information needed from a health record and proper authorization, complete an insurance form. To be rated as acceptable, the insurance form must be typed neatly and accurately according to departmental policies and procedures.

DUTIES AND RESPONSIBILITIES

1. Receive insurance form to be completed.
2. Log request for information into correspondence log.
3. Obtain patient's number from patient master index.
4. Sign out patient's record form appropriate area.
5. Verify patient's authorization for release of information on insurance form.
6. Type requested information onto insurance form.
7. Edit the insurance form and make necessary corrections.
8. Sign insurance form, if necessary.
9. Photocopy typed insurance form and place in record.
10. Forward completed insurance form
11. Return patient's record and remove sign out guide.

JOB CATEGORY - A

PROCESSING AND ABSTRACTING HEALTH RECORD INFORMATION

TASK #10 - RESPOND TO MAIL REQUEST FOR RELEASE OF INFORMATION

PERFROMANCE OBJECTIVE

Given a mail request to release health record information and proper authorization, process records for release of information. To be rated as acceptable, the information released must be accurate, legible and released without error according to both departmental policies/procedures and all applicable federal/state statutes regarding the confidentiality of patient health information.

DUTIES AND RESPONSIBILITIES

1. Receive mail request for release of information.
2. Log request into correspondence log book.
3. Obtain patient's number from patient master index.
4. Sign out patient's record form appropriate area.
5. Verify patient's authorization for release of information.
6. If release form does not correspond with policies, procedures, and/or applicable statutes, forward notification to requestor stipulating the information which is necessary to complete the request for health care data.
7. Photocopy requested information.
8. Forward photocopied information and bill if necessary.
9. File request in patient's record.
10. Return patient's record and remove sign out guide.

JOB CATEOGRY - A

PROCESSING AND ABSTRACTING HEALTH RECORD INFORMATION

TASK #11 - ANSWER TELEPHONE REQUEST FOR RELEASE OF INFORMATION.

PERFORMANCE OBJECTIVE

Given a telephone request for release of health record information and verifiable authorization, release patient information. To be rated as acceptable, the information released must be accurate, complete and released according to departmental policies and procedures without error.

DUTIES AND RESPONSIBILITIES

1. Receive telephone request for health record information.
2. Obtain caller's name and telephone number and reason for telephone request.
3. If not an emergency, ask caller to mail in a request with proper authorization.
4. Obtain patient's number from patient master index.
5. Sign out and retrieve record from appropriate area.
6. Verify caller's name, number and emergency situation before releasing information.
7. Log telephone call in release of information log.
8. Place not in record to indicate that information was released via telephone.
9. Forward record to appropriate area.

JOB CATEGORY - A

PROCESSING AND ABSTRACTING HEALTH RECORD INFORMATION

TASK #12 - PREPARE A HEALTH RECORD FOR COURT OR DEPOSITION

PERFORMANCE OBJECTIVE

Given a valid subpoena, court order or search warrant for health records of a patient, prepare a health record for court or deposition. To be rated as acceptable, the record must be prepared without error to departmental policies/procedures and all applicable federal/state statutes regarding the confidentiality of patient health information.

DUTIES AND RESPONSIBILITIES

1. Verify authenticity of subpoena.
2. Check patient master index to verify treatment of patient.
3. If treated, obtain patient number; if not, return legal document with notification of the inability to comply.
4. Retrieve medical record and replace with outguide or update computer locator information.
5. Analyze record for completeness.
6. Notify risk manager, physician or other designated person, if the case may involve the facility, an employee of the facility, or a member of the medical staff.
7. Remove correspondence or other reports not part of the health record.
8. Number pages in record, photocopy and have certification statement notarized, if necessary.
9. If using a medicolegal company, notify them as to date of appearance.
10. Record date of appearance in subpoena log book.
11. File legal document in a secure setting outside of original health record.
12. Retain legal document on file in accordance with department policies/procedures.
13. File reports removed from chart in outguide location.

(Educational Note: If uncertain as to the authenticity or validity of the legal document, hospital legal counsel should be contacted for advice.)

JOB CATEGORY - B

MAINTENANCE OF HEALTH RECORD INFORMATION

TASK #1 - MAINTAIN PATIENT INDEX

PERFORMANCE OBJECTIVE

Given patient information, type, verify and complete patient master index file. To be rated as acceptable, the patient master index must be accurate and contain all up-to-date information for each patient according to departmental policies and procedures without error.

DUTIES AND RESPONSIBILITIES

1. Determine if patient is a first time encounter or a revisit.
2. If this is the first encounter for the patient, type a new index card and/or enter information onto the computer.
3. If this is a revisit, update index card and/or computer information.
4. Check accuracy of information on card and/or computer.
5. File card in master patient index and/or computer.
6. Assure security of patient master index.
7. Audit patient master file for misfiles on a regular basis.

JOB CATEGORY - B

MAINTENANCE OF HEALTH RECORD INFORMATION

TASK #2 - TRACE LOST RECORD

PERFORMANCE OBJECTIVE

Given a request for a patient's lost record, trace lost record. To be rated as acceptable, all possible steps must be taken to locate the record according to departmental policies and procedures without error.

DUTIES AND RESPONSIBILITIES

1. Receive request for lost record.
2. Examine sign-out log/outguide and/or computer locator system for location of record.
3. Check area where record is supposed to be located.
4. If not found, search other files and departmental areas.
 - a. incomplete file-check for misfile
 - b. permanent file-check for misfile
 - c. transcription area
 - d. correspondence area
 - e. coding/abstracting area
 - f. microfilm area
 - g. other files
5. Check other areas of hospital, such as clinics, if applicable.
6. If record is found, forward to requestor; if not found, make a notation in patient index that record is temporarily unavailable.

JOB CATEGORY - B

MAINTENANCE OF HEALTH RECORD INFORMATION

TASK #3 - MAINTAIN A TUMOR REGISTRY

PERFORMANCE OBJECTIVE

Given records of patients with tumors, maintain a tumor registry. To be rated as acceptable, the registry must be neat, legible, accurate and the information must be typed and/or recorded onto a computer according to departmental policies/procedures without error.

DUTIES AND RESPONSIBILITIES

1. Obtain health record of tumor patient.
2. If this is a new patient, record information into accession registry.
3. Initiate or update patient information into tumor registry master patient index.
4. Complete tumor registry abstract form for Department of Health and forward.
5. Complete and/or update tumor registry tickler file.
6. Conduct follow-up, as necessary, on tumor patients.
7. Record information of a deceased patient into registry.

JOB CATEGORY - B

MAINTENANCE OF HEALTH RECORD INFORMATION

TASK #4 - CODE DIAGNOSIS AND PROCEDURES USING THE CURRENT MODIFICATION OF THE INTERNATIONAL CLASSIFICATION OF DISEASES (ICD-9-CM).

PERFORMANCE OBJECTIVE

Given an uncoded health record, code diagnosis and procedures using ICD-9-CM. To be rated as acceptable, the record must be coded according to ICD-9-CM principles and completed according to departmental policies/procedures without error.

DUTIES AND RESPONSIBILITIES

1. Receive record to be coded.
2. Review record for items to be coded.
3. Select principal diagnosis according to guidelines, identify correct code number and write on record.
4. Select other diagnoses to be coded and identify code number(s) and write on record.
5. Select principal procedure, if any, according to guidelines and identify correct code number and write on record.
6. Select other procedures, if any, and identify code number(s) and write on record.
7. Check code numbers for accuracy, legibility and sequencing.
8. Forward record to appropriate area.

JOB CATEGORY - B

MAINTENANCE OF HEALTH RECORD INFORMATION

TASK #5 - ASSIGN MAJOR DIAGNOSTIC CLASSIFICATION (MDC) AND DIAGNOSTIC RELATED GROUPS (DRG)

PERFORMANCE OBJECTIVE

Given records coded with ICD-9-CM, assign Diagnostic Related Groups. To be rated as acceptable, the records must be assigned to the appropriate Diagnostic Related Group without error according to departmental policies/procedures and, where applicable, in accordance with external reviewing organization.

DUTIES AND RESPONSIBILITIES

1. Receive ICD-9-CM coded record.
2. Verify proper sequencing of diagnoses.
3. Verify proper sequencing of procedures.
4. Notify physician regarding questions of possible sequencing changes.
5. Verify proper code numbers for diagnoses.
6. Verify proper code numbers for procedures.
7. Assign appropriate Major Diagnostic Classification and Diagnostic Related Group within the MDC.
8. Forward MDC and associated DRG information to appropriate individual.

(Educational Note: Major Diagnostic Classification and Associated Diagnostic Related Groups can be assigned either manually by using the appropriate technical guides or automatically by utilizing computerized DRG assignment software programs.)

JOB CATEGORY - B

MAINTENANCE OF HEALTH RECORD INFORMATION

TASK #6 - CODING DIAGNOSES AND PROCEDURES USING CPT-4

PERFORMANCE OBJECTIVE

Given an uncoded outpatient health record, code procedures. To be rated acceptable, the coding must be done according to department policies/procedures without error. The record must be coded in accordance with Health Care Finance Administration (HCFA) Common Procedure Coding System (HCPCS) principles, where applicable, using the Current Procedural Terminology - 4 (CPT-4) methodology.

DUTIES AND RESPONSIBILITIES

1. Receive outpatient record to be coded.
2. Review record for procedures to be coded.
3. Select the most appropriate diagnostic test or procedure which correlates to the CPT-4 coding guidelines and enter onto record.
4. Contact physician if record documentation does not permit exact coding for further clarification and enter onto record.
5. Check CPT-4 coding number(s) for accuracy, legibility, and sequencing.
6. After completion, forward record to appropriate area according to record completion routing procedures.

JOB CATEGORY - B

MAINTENANCE OF HEALTH RECORD INFORMATION

TASK #7 - MANUAL MAINTENANCE OF DIAGNOSTIC INDICES

PERFORMANCE OBJECTIVE

Given coded health records, maintain diagnostic indices. To be rated as acceptable, each record must be recorded into the diagnostic index according to departmental policies/procedures without error.

DUTIES AND RESPONSIBILITIES

1. Receive coded health record to be indexed.
2. Record diagnostic code(s) or index card(s).
3. Prepare a list of all records indexed.
4. Check that all records are indexed.
5. Forward record to appropriate area.
6. Process or store diagnostic indices.
7. Secure diagnostic indices.

(Educational Note: This task pertains only to unautomated abstracting functions.)

JOB CATEGORY - B

MAINTENANCE OF HEALTH RECORD INFORMATION

TASK#8 - MANUAL MAINTANENCE OF PROCEDURAL INDICES

PERFORMANCE OBJECTIVE

Given coded health records with procedures, maintain procedure indices. To be rated as acceptable, each record must be recorded into the procedure index according to departmental policies an procedures without error.

DUTIES AND RESPONSIBILITIES

1. Receive coded health record to be indexed.
2. Record procedure code(s) on index card(s).
3. Prepare a list of all records indexed.
4. Check that all records are indexed.
5. Forward record to appropriate area.
6. Process or store procedure indices.
7. Secure procedure indices.

(Educational Note: This task pertains only to unautomated abstracting functions.)

JOB CATEGORY - B

MAINTENANCE OF HEALTH RECORD INFORMATION

TASK #9 - MAINTAINING PHYSICIAN'S INDICES.

PERFORMANCE OBJECTIVE

Given physician's coded information, maintain physician's indices. To be rated as acceptable, each record must be recorded into the physician's index according to departmental policies/procedures without error.

DUTIES AND RESPONSIBILITIES

1. Receive records with physician's name and/or code number.
2. Verify code number with master list of physician's code numbers.
3. Record physician's code number onto index card according to procedure.
4. Check that all physician's code numbers have been indexed for each patient treated.
5. Process or store physician's indices.
6. Secure physician's indices.

(Educational Note: This task pertains only to unautomated health record abstracting function.)

JOB CATEGORY - C

PERFORMING CLERICAL FUNCTIONS

TASK #1 - COMPOSE CORRESPONDENCE

PERFORMANCE OBJECTIVE

Given specifications of content information, compose correspondence. To be rated as acceptable, the correspondence must be legible and communicate the intended message according to department policies/procedures without error.

DUTIES AND RESPONSIBILITIES

1. Determine need to compose correspondence.
2. List major points to be conveyed.
3. Compose draft of correspondence.
4. Edit and revise draft of correspondence.
5. Prepare final copy of correspondence.
6. Submit correspondence to appropriate individual.

JOB CATEGORY - C

PERFORMING CLERICAL FUNCTIONS

TASK #2 - TYPE CORRESPONDENCE

PERFORMANCE OBJECTIVE

1. Receive draft of correspondence to be typed.
2. Review draft of correspondence.
3. Type correspondence using specified format.
4. Edit typed correspondence for grammar, spelling, punctuation and sentence structure.
5. Correct all errors.
6. Proofread final copy.
7. Submit correspondence to appropriate individual for review and signature.

JOB CATEGORY - C

PERFORMING CLERICAL FUNCTIONS

TASK #3 - RECORD TELEPHONE MESSAGES.

PERFORMANCE OBJECTIVE

Given the task of answering the telephone, record telephone messages. To be rated as acceptable, the telephone must be answered promptly and politely and the messages must be taken according to departmental policies/procedures without error.

DUTIES AND RESPONSIBILITIES

1. Answer the telephone by identifying yourself and the department.
2. Ask the caller with whom they wish to speak with and who the caller is.
3. If possible, transfer call to requested individual.
4. If not transferable, obtain message from caller indicating the caller's name, organization, date, and time call was received.

JOB CATEGORY - C

PERFORMING CLERICAL FUNCTIONS

TASK #4 - TRANSCRIBE RECORDED DICTATION

PERFORMANCE OBJECTIVE

Given dictated materials, transcribe recorded dictation. To be rated as acceptable, the reports must be neat, legible, and transcribed according to departmental policies/procedures without error.

DUTIES AND RESPONSIBILITIES

1. Receive dictated material.
2. Select materials to be typed in order of priority.
3. Type materials in specified format.
4. Edit typed materials for accuracy and completeness.
5. Type reference initials, date dictated and date transcribed on bottom of form.
6. Record completion of typed material in control log.
7. Forward completed report to appropriate individual or area.

JOB CATEGORY - C

PERFORMING CLERICAL FUNCTIONS

TASK #5 - FILE ALPHABETICALLY

PERFORMANCE OBJECTIVE

Given documents, file in alphabetical order. To be rated as acceptable, the documents must be filed according to departmental policies/procedures without error.

DUTIES AND RESPONSIBILITIES

1. Receive documents to be filed alphabetically.
2. Sort documents to be filed according to type (index card, record, etc.)
3. Arrange each type of document in alphabetical order.
4. Prepare cross-reference cards, if necessary, and file.
5. File document in alphabetical order in proper location.
6. Audit files for misfiles.

JOB CATEGORY - C

PERFORMING CLERICAL FUNCTIONS

TASK #6 - FILE PHONETICALLY (SOUNDEX FILING METHOD)

PERFORMANCE OBJECTIVE

Given documents, file in phonetical order. To be rated as acceptable, the documents must be filed according departmental policies/procedures without error.

DUTIES AND RESPONSIBILITIES

1. Receive documents to be filed phonetically.
2. Sort documents to be filed according to type (index, card, record, etc.)
3. Convert name on document to phonetic system.
4. Arrange documents phonetically.
5. Prepare cross-reference card, if necessary, and file.
6. File documents phonetically.
7. Audit files for misfiles.

JOB CATEGORY - C

PERFORMING CLERICAL FUNCTIONS

TASK #7 - FILE NUMERICALLY.

PERFORMANCE OBJECTIVE

1. Receive documents to be filed numerically.
2. Sort documents to be filed according to type (index, card, record, etc.)
3. Arrange documents in proper numeric order (terminal digit, middle digit, straight numeric, etc.)
4. Prepare cross-reference card, if necessary, and file.
5. File documents in correct numerical order.
6. Audit files for misfiles.

JOB CATEGORY - C

PERFORMING CLERICAL FUNCTIONS

TASK #8 - PREPARE A HEALTH RECORD FOR MICROFILMING.

PERFORMANCE OBJECTIVE

Given a health record to be placed on microfilm, prepare it for microfilming. To be rated as acceptable, the health record must be prepared according to departmental policies/procedures without error.

DUTIES AND RESPONSIBILITIES

1. Retrieve record ready for microfilming.
2. Remove all staples and other fasteners.
3. Verify all forms in record for correct name and hospital number.
4. Remove any forms that are not correct name and hospital number.
5. Remove all blank forms.
6. Remove and destroy any forms not preserved by the hospital.
7. Check for proper sequence of record.
8. Rearrange any forms not in the proper sequence.
9. Place target sheet as top page of record to be microfilmed.
10. Place prepared record in appropriate area.

JOB CATEGORY - C

PERFORMING CLERICAL FUNCTIONS

TASK #9 - RECORD AND TRANSCRIBE MINUTES OF A MEETING.

PERFORMANCE OBJECTIVE

Given the task of taking minutes at a meeting, record, transcribe and distribute minutes. To be rated as acceptable, the minutes must be transcribed and distributed according to departmental policies/procedures without error.

DUTIES AND RESPONSIBILITIES

1. Receive notice to attend meeting and take minutes.
2. Go to meeting prepared to take notes.
3. Record attendance, date, and time meeting started.
4. Following agenda, record events of meeting.
5. Use tape recorder to record meeting, if necessary and permissible.
6. Note time meeting adjourned.
7. Type minutes in approved format.
8. Edit and correct any errors.
9. Submit draft for review, if necessary.
10. Make corrections or additions.
11. Photocopy and route minutes to attendees and others on an approved list (if it exists).
12. File original minutes in appropriate place.

JOB CATEGORY - D

MAINTAINING QUALITY CONTROL

TASK #1 - PREPARE REPORT OF PHYSICIAN'S INCOMPLETE RECORDS

PERFORMANCE OBJECTIVE

Given health records that are incomplete for a specific period of time, prepare a report of physician's incomplete records. To be rated as acceptable, the report must be completed in a timely manner according to departmental policies and procedures.

DUTIES AND RESPONSIBILITIES

1. Review physician's incomplete record file.
2. Identify records that are not complete within the specified time period according to the medical staff by-laws, joint commission on the accreditation of hospital (JCAH) standards and the applicable state department of health regulations.
3. Retrieve health records to verify delinquency.
4. Determine if physician has received notification of incomplete records.
5. Prepare report of delinquent incomplete records.
6. Forward report to appropriate individual and/or department.
7. Submit report to hospital administration.

JOB CATEGORY - D

MAINTAINING QUALITY CONTROL

TASK #2 - EVALUATE THE PROCEDURE FOR RELEASE OF PATIENT INFORMATION

PERFORMANCE OBJECTIVE

Given health records form which patient information has been released, evaluate the procedure for release of patient information. To be rated as acceptable, the procedure must be evaluated against established criteria according to departmental policies and procedures.

DUTIES AND RESPONSIBILITIES

1. Review procedure for release of patient information.
2. Determine time period to be covered by evaluation.
3. Retrieve records listed in correspondence log for specified time period.
4. Review patient's authorization for release of information for appropriate signature and date.
5. Identify any invalid patient authorizations.
6. Submit findings to appropriate individual.

JOB CATEGORY - D

MAINTAINING QUALITY CONTROL

TASK #3 - EVALUATE THE PROCEDURE FOR HEALTH RECORD ANALYSIS

PERFORMANCE OBJECTIVE

1. Given health records that have been analyzed, evaluate the procedure for health record analysis. To be rated as acceptable, the health records reviewed must have been analyzed according to departmental policies and procedures without error.

DUTIES AND RESPONSIBILITIES

1. Review procedure for health record analysis.
2. Determine time period to be covered by evaluation.
3. Retrieve records to be reviewed specified time period.
4. Review records to be reviewed specified time period.
5. Identify any records with omissions.
6. Submit findings to appropriate individual.
7. Implement new and/or revised policies/procedures subsequent to the review and analysis of the quality control study findings.

JOB CATEGORY - D

MAINTAINING QUALITY CONTROL

TASK #4 - EVALUATE THE PROCEDURES FOR ABSTRACTING AND CODING

PERFORMANCE OBJECTIVE

Given abstracted and coded records, evaluate the procedures for abstracting and coding. To be rated as acceptable, the records must be abstracted and coded according to departmental policies and procedures without error.

DUTIES AND RESPONSIBILITIES

1. Review procedures for abstracting and coding.
2. Determine time period to be covered by evaluation.
3. Retrieve records to be reviewed for specified time period.
4. Reabstract record and check original abstracted information for differences.
5. Make necessary changes.
6. Recode record and check original codes for differences.
7. Make necessary changes.
8. Where applicable, generate change notices for the business office (finance) if corrections have an impact on payor reimbursement to the facility.
9. Submit findings to appropriate individual.
10. Implement new and/or revised policies/procedures subsequent to the review and analysis of the quality control study findings.

JOB CATEGORY - D

MAINTAINING QUALITY CONTROL

TASK #5 - EVALUATE THE PROCEDURE FOR TRANSCRIBING MEDICAL REPORTS

PERFORMANCE OBJECTIVE

Given transcribed medical reports, evaluate the procedure for transcribing medical reports. To be rated as acceptable, the transcribed reports must be completed according to departmental policies and procedures without error.

DUTIES AND RESPONSIBILITIES

1. Review procedure for transcribing medical reports.
2. Determine time period to be evaluated.
3. Select reports to be evaluated.
4. Screen each report for grammar, spelling (medical and medical), neatness, legibility and completeness.
5. Identify any reports with omissions or errors.
6. Make necessary corrections.
7. Submit findings to appropriate individual.
8. Implement new and/or revised policies/procedures subsequent to the review and analysis of the quality control study findings.

JOB CATEGORY - D

MAINTAINING QUALITY CONTROL

TASK #6 - PERFORM QUALITY REVIEW

PERFORMANCE OBJECTIVE

Given the task of performing quality review prepare materials and perform quality review. To be rated as acceptable, the materials must be identified, located and prepared for quality review according to departmental policies and procedures without error.

DUTIES AND RESPONSIBILITIES

1. Select and/or be given topic for quality review.
2. Select and/or be given criteria and standards for quality review.
3. Determine time period to be included in review.
4. Determine number of records to be selected for review.
5. Retrieve and sign out records to be reviewed.
6. Review each record for compliance with criteria and standards.
7. Record findings of review.
8. Forward report to appropriate individual or committee.
9. Implement new and/or revised procedures/policies subsequent to the review and analysis of the quality review findings.

JOB CATEGORY - D

MAINTAINING QUALITY CONTROL

TASK #7 - CONDUCTING AND PREPARING MATERIALS FOR THE CONCURRENT UTILIZATION REVIEW PROCESS

PERFORMANCE OBJECTIVE

Given a medical information system, conduct a review of information and prepare materials for use on the Utilization Review process. To be rated as acceptable, the review and preparation must be accomplished, without error, in accordance with established department policies/procedures and criteria developed by exterior authorities in conducting reviews of the utilization of hospital resources.

DUTIES AND RESPONSIBILITIES

1. Determine which health records are to be reviewed on a daily basis.
2. Determine the standards and/or criteria to be used per each review to be conducted.
3. Retrieve records for review.
4. Document findings of the reviews on appropriate reporting format.
5. Submit reports to appropriate authority to determine the need for continued hospitalization.
6. If a need for continue hospitalization is made by the authority, re-establish a time frame for when the next utilization review will take place by entering review date on appropriate format or into computer routine.
7. If documentation for the need for continued hospitalization does not exist and the continuation of the hospital stay is denied, refer to the director for appropriate handling of termination notices.
8. Maintain and retain data elements abstracted for each review as prescribed by department policies/procedures.

JOB CATEGORY - D

MAINTAINING QUALITY CONTROL

TASK #8 - PREPARE MATERIALS FOR ACCREDITATION

PERFORMANCE OBJECTIVE

Given a specified date for an accreditation review, prepare materials for accreditation. To be rated as acceptable, the materials must be prepared prior to the specified date according to departmental policies/procedures and accrediting review guidelines without error.

DUTIES AND RESPONSIBILITIES

1. Receive notice of accreditation review.
2. Review standards and criteria for accreditation.
3. Complete accreditation review survey form.
4. Obtain all materials required by the accreditation review team.
5. Correct received or actual deficiencies prior to scheduled date of accreditation review visit.
6. Notify staff of accreditation review visit.

JOB CATEGORY - E

MANAGEMENT AND SUPERVISION OF EMPLOYEES

TASK #1 - WRITE OR REVISE A POSITION DESCRIPTION

PERFORMANCE OBJECTIVE

Given job specifications, write or revise a position description. To be rated as acceptable, the position description must contain all necessary job specifications and be written or revised according to departmental and facility policies/procedures without error.

DUTIES AND RESPONSIBILITIES

1. Identify need for new or revised position description.
2. Identify skills required for job.
3. Identify education and/or experience required for job.
4. Identify personal relationships required of job.
5. Identify major duties and responsibilities of job and the percentage of time spent on each function.
6. Establish standards of productivity/acceptability (quantitative/qualitative) for each duty/responsibility listed.
7. Write or revise job description.
8. File or route job description to appropriate area.

(Educational Note: It is of importance to involve those employees who are performing specified tasks when developing/revising position descriptions.)

JOB CATEGORY - E

MANAGEMENT AND SUPERVISION OF EMPLOYEES

TASK #2 - DEVELOP STAFFING PLAN

PERFORMANCE OBJECTIVE

Given departmental goals, objectives and job duties, develop staffing plan. To be rated as acceptable, the staffing plan must describe the staff needed to accomplish work functions within budget and time constraints according to departmental and facility policies and procedures without error.

DUTIES AND RESPONSIBILITIES

1. Analyze departmental goals, objectives and job duties.
2. Analyze departmental budget for staffing allowance.
3. Determine the number of required job positions necessary to achieve plan.
4. Identify the number of positions available within budget.
5. Write comprehensive and detailed staffing plan.

JOB CATEGORY - E

MANAGEMENT AND SUPERVISION OF EMPLOYEES

TASK #3 - PREPARE STAFF WORK SCHEDULE

PERFORMANCE OBJECTIVE

Given specifications of work to be completed, prepare staff work schedule. To be rated as acceptable, the work schedule must indicate completion of work within a specified time period according to departmental and facility policies/procedures without error.

DUTIES AND RESPONSIBILITIES

1. Analyze specifications of work to be completed.
2. Analyze staff capabilities and availability.
3. Analyze departmental staffing plan.
4. Establish priorities for completing work.
5. Analyze availability of equipment and supplies needed for completing work.
6. Compile and complete comprehensive and detailed work schedule.

JOB CATEGORY - E

MANAGEMENT AND SUPERVISION OF EMPLOYEES

TASK #4 - HIRE EMPLOYEES

PERFORMANCE OBJECTIVE

Given a job opening, hire an employee. To be rated as acceptable, the applicant selected must meet job specifications and requirements as listed on the position description and be hired according to departmental and facility policies/procedures without error.

DUTIES AND RESPONSIBILITIES

1. Determine position available within department.
2. Review current position description and update, if necessary.
3. If new position, write position description and seek administrative approval for the position.
4. Notify personnel department of position opening.
5. Prepare questions and/or test for applicants.
6. Receive applications for review from personnel department.
7. Schedule interviews with applicants.
8. Interview applicants and test, if applicable.
9. Give applicant opportunity to review approved position description.
10. Summarize strengths and weaknesses of applicants.
11. Verify qualifications and experience of applicants.
12. Rank each applicant from most qualified to least qualified.
13. Notify personnel department of selection after review of applicants with department director or administration.

(Educational Note: It is important for the interviewer to be knowledgeable on the federal/state statutes regarding the appropriate methods by which interviews can be conducted. Any and all questions and/or uncertainties should be addressed by the personnel department before interviews for an open position commence.)

JOB CATEGORY - E

MANAGEMENT AND SUPERVISION OF EMPLOYEES

TASK #5 - COUNSEL AND DISCIPLINE EMPLOYEE

PERFORMANCE OBJECTIVE

Given an employee with unsatisfactory work performance, give employee counseling and discipline. To be rated as acceptable, the employee must be counseled and disciplined according to departmental and facility policies/procedures.

DUTIES AND RESPONSIBILITIES

1. Review employee's work performance record.]
2. Determine employee's work performance as unsatisfactory.
3. Review guidelines for counseling and disciplining an employee.
4. Document employee's unsatisfactory work performance.
5. Counsel employee regarding unsatisfactory work performance.
6. Observe employee's work performance.
7. Document improvement or continued unsatisfactory work performance.
8. If unsatisfactory work performance is observed, give employee disciplinary action or probation.
9. Compose written notification of unsatisfactory work performance.
10. Document further unsatisfactory work performance.
11. Notify appropriate individual's of decision to terminate employee.

JOB CATEGORY - E

MANAGEMENT AND SUPERVISION OF EMPLOYEES

TASK #6 - COMPLETE EMPLOYEE PERFORMANCE APPRAISAL.

PERFORMANCE OBJECTIVE

Given performance standards, employee production and attendance records, complete employee performance appraisal. To be rated as acceptable, the employee appraisal must be completed in a timely manner according to departmental and facility policies and procedures.

DUTIES AND RESPONSIBILITIES

1. Determine employee's performance appraisal to be completed.
2. Review employee's position description.
3. Review employee's work performance records.
4. Review employee's attendance records.
5. If applicable, review any anecdotal notes which have been made on the employee's personnel file over the course of the evaluation period.
6. Evaluate employee's record relevant to departmental standards.
7. Discuss evaluation with employee at a mutually convenient date and time.
8. Have evaluation form signed by immediate supervisor (evaluator).
9. Obtain employee signature and comments.
10. File and/or forward employee appraisal to appropriate area.

JOB CATEGORY - E

MANAGEMENT AND SUPERVISION OF EMPLOYEES

TASK #7 - ORIENT NEW EMPLOYEE.

PERFORMANCE OBJECTIVE

Given a new employee, orient employee to department and facility. To be rated as acceptable, the orientation must be thorough, complete and performed according to departmental and facility policies/procedures.

DUTIES AND RESPONSIBILITIES

1. New employee is hired.
2. Introduce employee to other personnel.
3. Give employee a tour of the department.
4. Give employee a tour of the facility.
5. Give employee work area and desk.
6. Give employee a copy of the departmental policies and procedures.
7. Give employee a copy of job description.
8. Discuss departmental goals, work requirements, work schedule, etc., with employee.
9. Ask employee if he/she has any questions.
10. Document employee orientation activities in personnel file.

(Educational Note: It is advisable to develop an orientation format to be signed by the new employee, immediate supervisor, and department director subsequent to the orientation process.)

JOB CATEGORY - E

MANAGEMENT AND SUPERVISION OF EMPLOYEES

TASK #8 - TRAIN EMPLOYEE

PERFORMANCE OBJECTIVE

Given new equipment, position description and/or function, train employee. To be rated as acceptable, the employee must be trained effectively and completely according to departmental policies/procedures.

DUTIES AND RESPONSIBILITIES

1. Identify employee who needs training.
2. Determine method of instruction.
3. Obtain or develop instructional materials.
4. Schedule training session(s) for employee.
5. Inform employee of training schedule.
6. Conduct training session(s) as scheduled.
7. Evaluate performance of employee.
8. Record employee achievement results.
9. Inform employee of achievement results.
10. Retrain employee as necessary.

JOB CATEGORY - E

MANAGEMENT AND SUPERVISION OF EMPLOYEES

TASK #9 - COORDINATE CONTINUING EDUCATION OPPORTUNITIES.

PERFORMANCE OBJECTIVE

Given personnel requiring continuing education, coordinate continuing education opportunities. To be rated as acceptable, the continuing education opportunities must include participation of specified personnel, meet the assessed needs of the personnel and be coordinated according to departmental and facility policies/procedures.

DUTIES AND RESPONSIBILITIES

1. Determine employee continuing education requirements.
2. Assess professional and nonprofessional needs.
3. Identify available continuing education programs.
4. Develop inservice continuing education programs, if necessary.
5. Inform employees of available continuing education programs.
6. Schedule employees to attend sessions.
7. Record employees attendance at sessions.
8. Obtain evaluation of sessions from employees.
9. Prepare report of continuing education participation.
10. Forward report to appropriate area.
11. Revise educational policies, protocol, and/or programs as is necessary after review of evaluations submitted by employees.

JOB CATEGORY - E

MANAGEMENT AND SUPERVISION OF EMPLOYEES

TASK #10 - MAINTAIN EMPLOYEE PERSONNEL FOLDER.

PERFORMANCE OBJECTIVE

Given personnel data and information, maintain employee personnel folder. To be rated as acceptable, a folder must be maintained for each employee, contain all employee data and information legible accurate and completed according to departmental and facility policies/procedures without error.

DUTIES AND RESPONSIBILITIES

1. Label a personnel folder for each employee.
2. Compile pertinent personnel data for each employee.
3. File or record personnel data in correct folder.
4. Update data in personnel folder on a regular basis.
5. Forward changes in personnel data to personnel department.
6. File personnel folder in a secured setting.
7. Should an employee voluntarily resign, have employment terminated, or transfer to another department, retain or destroy department personnel folder in accordance with policies/procedures.

JOB CATEGORY - F

PREPARATION OF ADMINISTRATIVE AND CLINICAL REPORTS

TASK #1 - DEVELOP FORMATS FOR VARIOUS REPORTS

PERFORMANCE OBJECTIVE

Given the data elements required in reports, develop formats for reporting. To be rated as acceptable, the format of the reports must provide all specified data according to departmental policies and procedures without error.

DUTIES AND RESPONSIBILITIES

1. Review data elements of report.
2. Identify relationships between data elements.
3. Arrange data elements in logical sequence.
4. Develop key or legend to illustrate report.
5. Establish data definitions for elements included in report.
6. Identify totals, summaries or recapitulations the report is to contain.
7. Draft format of report.
8. Evaluate report for completeness and compliance with reporting requirements.
9. Review report with appropriate individual or committee.
10. Make any necessary revisions.
11. Forward final report to appropriate area.

(Educational Note: Reporting formats and the necessary data elements for the reports can be developed either manually or by using report writing capabilities contained in hospital/department computer programs.)

JOB CATEGORY - F

PREPARATION OF ADMINISTRATIVE AND CLINICAL REPORTS

TASK #2 - MANUALLY PREPARE DAILY INPATIENT CENSUS REPORT

PERFORMANCE OBJECTIVE

Given the admissions and discharge for each nursing unit at midnight, prepare daily inpatient census report. To be rated as acceptable, the entries and calculations on the census report must be legible and completed according to departmental policies and procedures without error.

DUTIES AND RESPONSIBILITIES

1. Obtain head count and patients in and out for the specified time period, usually midnight, from each nursing unit.
2. Total the number of patients remaining in the facility for the specified time period.
3. Add the number of patients admitted for that period.
4. Subtract the number of patients discharged or died for that period.
5. Add the number of patients who were both admitted and discharged after the census taking period the previous day.
6. Report the resulting total as the inpatient daily census for that day.
7. Forward a copy of the report to the appropriate area.

(Educational Note: Statistics for this task can also be separated through automated data processing programs.)

JOB CATEGORY - F

PREPARATION OF ADMINISTRATIVE AND CLINICAL REPORTS

TASK #3 - MANUALLY PREPARE ADMISSIONS STATISTICAL REPORT

PERFORMANCE OBJECTIVE

Given the number of admissions for each nursing unit, prepare admissions statistical report. To be rated as acceptable, the statistical report must include all admissions for the reporting period and be completed according to departmental policies and procedures without error.

DUTIES AND RESPONSIBILITIES

1. Receive the number of admissions for the period from each nursing unit.
2. Add the number of admissions from each sheet.
3. Report the sum as the total admissions for that period.
4. Report the newborn admissions separately.
5. Verify admissions report with daily admissions list.
6. Forward the admissions report to the appropriate area.

JOB CATEGORY - F

PREPARATION OF ADMINISTRATIVE AND CLINICAL REPORTS

TASK #4 - MANUALLY PREPARE DISCHARGE STATISTICAL REPORT

PERFORMANCE OBJECTIVE

Given the number of discharges for each nursing unit, prepare discharge statistical report. To be rated as acceptable, the statistical report must include all admissions for the reporting period and be completed according to departmental policies and procedures without error.

DUTIES AND RESPONSIBILITIES

1. Receive the number of discharges for the period from each nursing unit.
2. Add the number of discharges from each sheet.
3. Report the sum as the total discharges for the period.
4. Report the number of deaths separately.
5. Verify discharges and deaths with the daily discharge list.
6. Forward the discharge report to the appropriate area.

JOB CATEGORY - F

PREPARATION OF ADMINISTRATIVE AND CLINICAL REPORTS

TASK #5 - MANUALLY PREPARE MONTHLY STATISTICAL REPORTS

PERFORMANCE OBJECTIVE

Given specifications for required monthly statistical reports, prepare monthly statistics. To be rated as acceptable, the reports must be completed according to departmental policies and procedures without error.

DUTIES AND RESPONSIBILITIES

1. Identify monthly statistical reports required to be completed.
2. Collect necessary source documents or data.
3. Identify appropriate formulae necessary to perform calculations.
4. Compute desired statistics.
5. Record calculated statistics on appropriate form.
6. Evaluate results for accuracy.
7. Forward copy of report to appropriate individual.
8. File original report in appropriate area.

JOB CATEGORY - F

PREPARATION OF ADMINISTRATIVE AND CLINICAL REPORTS

TASK #6 - RETRIEVE HEALTH RECORDS FOR A RESEARCH STUDY

PERFORMANCE OBJECTIVE

Given specifications for a research study, retrieve records for a research study. To be rated as acceptable, the records must be identified and retrieved in a timely manner according to departmental policies and procedures without error.

DUTIES AND RESPONSIBILITIES

1. Receive a request for a research study.
2. Obtain written assurance from researcher that records will be used only for the purpose requested and that patient identifying information will not be used for any submitted research report.
3. Determine information needed for research study.
4. Identify code numbers of diagnoses and/or procedure.
5. Search diagnostic and/or procedure indices to locate patient record numbers.
6. Retrieve appropriate records from file.
7. Use charge out locator system to indicate records removed from file for research study.
8. Notify requestor that records are ready for review.

JOB CATEGORY - G

PREPARATION OF GENERAL ADMINISTRATIVE SERVICES

TASK #1 - DEVELOP A POLICY MANUAL

PERFORMANCE OBJECTIVE

Given departmental and facility goals and objectives, develop a policy manual. To be rated as acceptable, the policy manual must reflect all departmental functions and be written according to facility and legal guidelines without error.

DUTIES AND RESPONSIBILITIES

1. Review facility and legal guidelines.
2. Identify policies that pertain to the health record department.
3. Review list of position descriptions and functions and identify those activities that require a departmental policy.
4. Develop draft of policy manual.
5. Review draft for errors, completeness and compliance with facility and legal guidelines.
6. Make any necessary revisions or corrections.
7. Review final draft with director and/or administration and obtain approval.
8. Duplicate required copies of policy manual.
9. Forward policy manual to appropriate individuals.
10. Ensure all original policies are available for use by department personnel.
11. Constantly revise policy manual as is necessary.

JOB CATEGORY - G

PREPARATION OF GENERAL ADMINISTRATIVE SERVICES

TASK #2 - DEVELOOP A PROCEDURE MANUAL

PERFORMANCE OBJECTIVE

Given departmental goals, objectives, and policies, develop a procedure manual. To be rated as acceptable, the procedure manual must provide procedures to accomplish all departmental functions and be written according to facility, accrediting/licensing agency, and legal guidelines.

DUTIES AND RESPONSIBILITIES

1. Review facility and legal guidelines.
2. Review departmental goals, objectives, and policies.
3. Review list of position descriptions and functions.
4. Develop format for procedure manual.
5. Write a procedure to accomplish each function of the department.
6. Test written procedures for coordinated, organized and logical use of time and space.
7. Make any necessary changes to accomplish the above (#6)
8. Review draft for errors, completeness and compliance with facility and legal guidelines.
9. Make any necessary revisions or corrections.
10. Review final draft with director and/or administration and obtain approval.
11. Duplicate required copies of procedure manual.
12. Forward procedure manual to appropriate individuals.
13. Ensure all original procedures are available for use by department personnel.
14. Constantly revise procedure manual as is necessary.

JOB CATEGORY - G

PREPARATION OF GENERAL ADMINISTRATIVE SERVICES

TASK #3 - DEVELOP A PLAN FOR SPACE UTILIZATION

PERFORMANCE OBJECTIVE

Given the health record department layout blueprint, develop a plan for space utilization. To be rated as acceptable, the plan for space utilization must include all specifications for furniture and equipment, workflow patterns and meet necessary safety and legal guidelines.

DUTIES AND RESPONSIBILITIES

1. Review departmental goals, objectives, policies and procedures.
2. Review current and projected position descriptions.
3. Determine current space needs.
4. Project future space needs.
5. Analyze working environment to include, workflow patterns, lighting, electrical needs, aisle space, seating arrangements, equipment placement, color schemes, fresh air flow.
6. Sketch layout of the department onto the blueprint.
7. Design a reference sheet to include each item on the blueprint and identify each item by letter or number.
8. Diagram work flow.
9. Check floor plan for efficiency, accuracy and completeness.
10. Forward blueprint to appropriate individual for final approval.

(Educational Note: It may be advisable to enlist the expertise of the facilities chief engineer, maintenance department, risk manager, safety officer, and architectural consultant (if under contract) when developing a floor plan.)

JOB CATEGORY - G

PREPARATION OF GENERAL ADMINISTRATIVE SERVICES

TASK #4 - ORDER SUPPLIES AND EQUIPMENT

PERFORMANCE OBJECTIVE

Given departmental goals, objectives, policies, procedures and blueprint, order supplies and equipment. To be rated as acceptable, all necessary supplies and equipment must be ordered according to facility guidelines.

DUTIES AND RESPONSIBILITIES

1. Review facility guidelines for ordering supplies and equipment.
2. Determine product needed.
3. Review sources of desired product.
4. Review product and source for specifications, cost, warranties, service contracts, durability, etc.
5. Select product and source.
6. Complete necessary form for ordering product.
7. Secure necessary approvals.
8. Copy order form and forward original to appropriate individual.

JOB CATEGORY - G

PREPARATION OF GENERAL ADMINISTRATIVE SERVICES

TASK #5 - PLAN AND CONDUCT A MEETING

PERFORMANCE OBJECTIVE

Given the need for a departmental meeting, plan and conduct the meeting. To be rated as acceptable, the meeting agenda must support the purpose of the meeting and the meeting must be planned and conducted according to departmental and facility guidelines.

DUTIES AND RESPONSIBILITIES

1. Determine a need for a departmental meeting.
2. Analyze purpose of the meeting.
3. Develop an agenda for the meeting to include date, time, place of the meeting.
4. Arrange for necessary room, visual aids, food, etc..
5. Determine list of participants.
6. Forward agenda to participants.
7. Develop handouts, if applicable.
8. Determine methods for implementing agenda.
9. Determine number of participants attending.
10. Copy appropriate number of handouts.
11. Conduct meeting.
12. Keep minutes of pertinent aspects of the meeting.
13. Transcribe minutes and distribute to all participants.
14. Have participants respond if errors in minutes are detected.
15. Correct errors and resubmit to participants.

JOB CATEGORY - G

PREPARATION OF GENERAL ADMINISTRATIVE SERVICES

TASK #6 - INVENTORY SUPPLIES AND EQUIPMENT.

PERFORMANCE OBJECTIVE

Given a health record department with supplies and equipment, inventory the supplies and equipment. To be rated as acceptable, the inventory must be completed and updated according to departmental and facility policies/procedures without error.

DUTIES AND RESPONSIBILITIES

1. Obtain inventory list of supplies and equipment.
2. Locate each item on list.
3. Record location of each item on inventory list.
4. Record quantity of each item on inventory list.
5. Indicate on list any item not located.
6. Report losses of supplies or equipment.
7. Make copies of inventory report.
8. Forward copies of report to appropriate individuals.
9. File inventory list in appropriate area.

JOB CATEGORY - G

PREPARATION OF GENERAL ADMINISTRATIVE SERVICES

TASK #7 - DEVELOP A HEALTH RECORD MANAGEMENT SYSTEM

PERFORMANCE OBJECTIVE

Given a health record department with goals, objectives, policies and procedures, develop a health record management system. To be rated as acceptable, the health record management system must accomplish all the functions in the department according to facility, accrediting/licensing agency, and legal guidelines.

DUTIES AND RESPONSIBILITIES

1. Review facility and legal guidelines for operating a health record department.
2. Evaluate adequacy of existing departmental management system by reviewing reports of accreditation, licensing, and operation.
3. Analyze the organization chart and workflow.
4. Develop and/or revise policies and/or procedures as necessary.
5. Compile draft of health record management system.
6. Obtain administrative approval for the plan.
7. Make necessary revisions.
8. Photocopy and forward to appropriate individuals.
9. File original copy in appropriate area.

JOB CATEGORY - G

PREPARATION OF GENERAL ADMINISTRATIVE SERVICES

TASK #8 - PREPARE DEPARTMENTAL BUDGET

PERFORMANCE OBJECTIVES

Given departmental goals, objectives, policies and procedures, prepare departmental budget. To be rated as acceptable, the budget must be prepared within the established funds available according to departmental and facility guidelines.

DUTIES AND RESPONSIBILITIES

1. Receive and review established funding for year.
2. Analyze past departmental expenditures for each line item with last year's budget.
3. Analyze future needs of department and establish priorities.
4. Determine future human resources, capital equipment and operating expenses needed for the year.
5. Draft recommended budget and necessary justifications to accompany budget.
6. Forward completed budget and related documents.

JOB CATEGORY - G

PREPARATION OF GENERAL ADMINISTRATIVE SERVICES

TASK #9 - MAINTAIN AND UPDATE POLICY AND PROCEDURE MANUALS

PERFORMANCE OBJECTIVE

Given departmental policies and procedures, maintain and update the policies and procedures as necessary. To be rated as acceptable, the policies and procedures must be reviewed and updated at least once a year or if there is a revision in a law, regulation or accrediting standard and be maintained according to facility and departmental policies and procedures without error.

DUTIES AND RESPONSIBILITIES

1. Review revisions in laws, regulations and accrediting standards.
2. Analyze the revisions and determine the effects on the department.
3. Identify the policies and/or procedures affected by the revisions.
4. Identify and policies and/or procedures not revised in a year.
5. Draft revised policies and/or procedures.
6. Review draft for errors, completeness and compliance with facility and legal guidelines.
7. Make any necessary corrections.
8. Review final draft with administration and obtain approval.
9. Place revised date on policies and/or procedures.
10. Remove old policies and/or procedures from manual and retain according to guidelines.
11. File revised policies and/or procedures in manual.
12. Forward copies of revised policies and/or procedures to appropriate individuals.

JOB CATEGORY - G

PREPARATION OF GENERAL ADMINISTRATIVE SERVICES

TASK #10 - CONDUCT A WORK DISTRIBUTION STUDY

PERFORMANCE OBJECTIVE

Given criteria for analyzing work distribution, conduct a work distribution study. To be rated as acceptable, the work distribution study must be conducted according to facility and departmental policies and procedures without error.

DUTIES AND RESPONSIBILITIES

1. Review criteria for analyzing work distribution.
2. Obtain or prepare work distribution form.
3. Select work period for the study.
4. Explain to each employee how to fill out the work distribution form.
5. Have each employee fill out form each day of the study.
6. Tally the time spent on all activities by each employee at the end of the study.
7. Prepare work distribution chart.
8. Analyze work distribution chart for uneven distribution of work.
9. Prepare summary of findings and make recommendations for review by administration.
10. Implement approved recommendations.
11. Reevaluate work distribution at a predetermined time.

ABSTRACT

85-7015: A Curriculum Guide for Medical Record Technologist.

Joyce Garozzo, RRA
John J. Ford, MS
Harrisburg Area Community College
3300 Cameron Street Road
Harrisburg, Pennsylvania 17110-2999

\$16,845.00 Federal
7/1/86 to 6/30/87

The purpose of this project was to develop a generic curriculum guide for use by the public sector in the State of Pennsylvania.

DISSEMINATION

This material is to be in the public domain and should be available upon request for any institution or private concern to utilize this information for the development of a medical record technologist program.